

Financial Advisor Recommendations:

Spoke with Kimberley from Principal, she gathered my information to speak with her back office, regarding options with my donor advised fund. She was going to suggest life insurance, listing charitable beneficiaries, but due to me being on SSDI, I would be uninsured automatically. (7/24/2024)

Principal suggested I consult a tax advisor, regarding my donor advised fund, as they are unable to help me at Principal. (7/26/2024)

The financial advisor I spoke to was Kimberly C. Figueroa. She based her interactions with me regarding my DAF based off her experience with Ameriprise Financial. (9/16/2024)